



## Special Circumstances

From the list provided, indicate the reason for the requested review of your family's financial situation.

**Loss of a Job, or Parental Loss of Job**

- Provide Separation/Termination Notice or documentation showing effective date of termination.
- Provide documentation of severance package (if one exists).
- Provide statement of Unemployment Benefits and effective dates.

**Loss of Untaxed Income**

- Loss of Social Security Benefits
  - Provide notification of termination of benefits.
- Loss of Child Support
  - Provide court documentation stating the date of termination of benefits.
- Loss of Worker's Compensation
  - Provide appropriate documentation stating date of termination of benefits.
- Other. Please attach appropriate documentation.

**Loss of Taxable Income**

- Loss of Alimony
  - Provide court documentation stating the date of termination of benefits.
- Loss of Unemployment Benefits
  - Provide letter from the unemployment office stating date of termination.
- Other. Please attach appropriate documentation.

**Excessive Medical Expenses**

*Payments made out of pocket beyond what your insurance covers. Do not include insurance premium costs.*

- Provide bills showing the expenses.
- Provide proof of personal payment of the expenses in question (check stubs, receipts, etc)

**Other Circumstances.**

Please list \_\_\_\_\_

## Income Assessment Form

Please complete the table below to help us assess your actual income for 2009. Report all income you expect to receive through December 31, 2009 in the appropriate boxes. You must include documentation supporting all income. This documentation could include but is not limited to:

- Recent pay stubs showing year-to-date earnings (since January 1, 2009)
- A letter from your employer stating total 2009 projected and or actual earnings

If you are submitting the request for consideration after December 31, 2009, please submit a copy of your W-2 forms and completed 2009 federal income tax return.

### STUDENT INCOME AND ASSET INFORMATION

Income For 2009 (Jan 1 To Dec 31)	Actual 1-1-09 To Today	Estimated Today To 12-31-09	Total= Actual + Estimated
STUDENT: expected income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
SPOUSE: expected income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
Other Taxable income: (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains) Indicate source:	\$	\$	\$
Social Security benefits	\$	\$	\$
Child Support received	\$	\$	\$
Other untaxed income: (earned income credits, welfare benefits, workers comp., payments to IRA/Keogh, etc) Indicate source:	\$	\$	\$
<b>Total Student and/or Spouse Income for 2009</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

Please list your current asset information (if any of the following are applicable):

*Net Worth means market value of the asset minus debt on the asset*

- Current amount of cash, savings, and checking: \$ \_\_\_\_\_
- Current net worth of real estate/ investments (other than home): \$ \_\_\_\_\_
- Current net worth of farm or business: \$ \_\_\_\_\_

### PARENT INCOME AND ASSET INFORMATION (For Dependent students only)

Income For 2009(Jan 1 To Dec 31)	Actual 1-1-09 To Today	Estimated Today To 12-31-09	Total= Actual + Estimated
FATHER: expected income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
MOTHER: expected income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
Other Taxable income: (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains) Indicate source:	\$	\$	\$
Social Security benefits	\$	\$	\$
Child Support received	\$	\$	\$
Other untaxed income: (earned income credits, welfare benefits, workers comp., payments to IRA/Keogh, etc) Indicate source	\$	\$	\$
<b>Total Parental Income for 2009</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

Please list your current asset information (if any of the following are applicable):

*Net Worth means market value of the asset minus debt on the asset*

- Current amount of cash, savings, and checking: \$ \_\_\_\_\_
- Current net worth of real estate/ investments (other than home): \$ \_\_\_\_\_
- Current net worth of farm or business: \$ \_\_\_\_\_

### Certification and Signature

My signature below certifies that the information I have provided on this form is accurate. I agree to provide proof of the information if requested.

Parent Signature \_\_\_\_\_ Date \_\_\_\_\_

Student Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse of Student Signature \_\_\_\_\_ Date \_\_\_\_\_

#### Submit to:

OFFICE OF STUDENT FINANCIAL PLANNING  
1050 UNION UNIVERSITY DRIVE  
JACKSON, TN 38305  
PHONE 731-661-5015 FAX 731-661-5570  
EMAIL: [finaid@uu.edu](mailto:finaid@uu.edu)

#### FOR OFFICE USE ONLY

\_\_\_ Student Not Eligible

\_\_\_ Special Circumstances Adjustment Request Denied

Comments \_\_\_\_\_  
\_\_\_\_\_

\_\_\_ Special Circumstances Adjustment Approved

\_\_\_ EFC Changed

FA ADMINISTRATOR \_\_\_\_\_

DATE \_\_\_\_\_